

IDAHO EMPLOYMENT

A monthly newsletter of the Idaho Department of Labor



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State Overview

IDAHO'S UNEMPLOYMENT RATE UNCHANGED AT 4.8 PERCENT

The seasonally adjusted unemployment rate for February 2004 was 4.8 percent, up one-tenth of a percentage point from January's revised rate of 4.7 percent rate. Idaho's February unemployment rate was eight-tenths of a percentage point below the 5.6 percent rate experienced one year ago. The national unemployment rate in February was 5.6 percent, unchanged from January 2004, but down three-tenths of a percentage point from February 2003.

Idaho's seasonally adjusted *Civilian Labor Force* reached a record level in February—700,600 people. The number of unemployed persons decreased by 800 to 33,700 in February. Seasonally adjusted, the number of persons working increased by 2,700 to 666,900 from January to February. Idaho's labor force has grown monthly since August 2003 reflecting an increase in the number of people working. Compared to last year 10,800 additional people were working this February than one year earlier.

From one year ago, the number of persons unemployed decreased by 4,600. As a result of the changes in the number of persons employed and unemployed, the labor force increased 1.6 percent, or 10,800, since February 2003. Nationally, the number of employed individuals increased by nearly one million between February 2003 and February 2004. This was a 0.7 percent increase, less than half of the percentage increase experienced in Idaho.

AREA AND COUNTY LABOR FORCE HIGHLIGHTS

State Table 1 on page 3 presents labor force details for Idaho Labor Market Areas, counties, and major cities.

Adams County and Clearwater County were the only counties that experienced double-digit unemployment rates in February. Adams County experienced an 11.6 percent unemployment rate, down from 15.4 percent in January. Clearwater County went the opposite direction as the February 10.1 percent rate increased from 9.4 percent in January.

Three counties experienced unemployment rates at or below 3 percent for February 2004, including Latah County at 2.7 percent, Madison County at 1.8 percent, and Owyhee County at 1.7 percent.

The Cassia-Minidoka Labor Market Area (LMA) in south central Idaho had the highest February unemployment rate among the LMAs at 7.9 percent, up from January's 7.5 percent. The downturn

in food processing has resulted in a high unemployment pattern in this agriculture-oriented area. The state's Metropolitan Statistical Areas (MSAs)—Boise City and Pocatello City—had unemployment rates near the statewide average at 4.5 percent and 4.7 percent, respectively. The Bonneville LMA had the lowest February rate at 3.5 percent, followed closely by the Seaport LMA at 3.6 percent.

NONFARM PAYROLL JOBS

State Table 2 on page 4 provides details on Idaho Nonfarm Payroll Jobs employment.

Total *Nonfarm Payroll Jobs* employment increased 4,800 in February from January. This was nine-tenths of a percentage point increase compared to a loss of 17,000 jobs between December and January. Last month it was noted a large December to January decline in Idaho's nonfarm job count was not unusual as it was a result of typical seasonal and technical factors. By February, the layoffs of holiday shopping seasonal workers are completed and the winter weather moderates and a monthly gain in jobs is the norm. This year's monthly gain exceeded the five year trend of an average six-tenths of a percent increase as well as topping the February 2003 total jobs count by 9,300 for a year-over-year increase of 1.7 percent.

However, the gain did not occur in Idaho's *Goods-Producing Industries*, which incurred a 500 month-over-month job loss and a year-over-year decline of 1,900 jobs. *Construction* was down 300 jobs from January, but this small one-month change is basically insignificant. The industry remains strong as the 500 year-over-year increase supports. The monthly changes for the other industries in this super sector were very small and could be due to numerical rounding, not to any major labor market event.

Two year-over-year changes in the *Goods-Producing Industries* are worth noting. The loss of 600 jobs in *Wood Product Manufacturing* occurred during a time when prices for lumber and other building products were rising rapidly. The demand for sheet goods has been particularly strong, reportedly due to continued strong housing starts nationally and the need for lumber for rebuilding and reconstruction in war-torn areas. Despite the increased demand for building wood products, however, there hasn't been a need for Idaho manufacturers to hire a significant number of additional workers.

Computer & Electronic Product Manufacturing jobs have increased by 700 from last year's levels, a recurring situation for most of the last twelve months. This industry has not been losing jobs since its 2002 downturn, and the employment gains have been small and spotty throughout the industry.

Service-Providing Industries added 5,300 jobs in February from January and 11,200 jobs year-over-year. Only *Retail Trade* had a month-over-month loss of more than 100 jobs and even that was less than one percentage point change. Industries connected to education all had substantial increases. Winter recreation condi-

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tions were excellent and led to job increases in *Leisure & Hospitality*.

The breadth of the year-over-year gains in the individual *Services-Providing Industries* are indicative of Idaho's recovery from the national recession and the statewide economic downturn. Since approximately 80 percent of Idaho jobs are in these industries, it shouldn't be surprising that these industries are showing evidence of recovery.

AGRICULTURE

Idaho water supply for agriculture has been a frequent topic in this newsletter. The state has experienced three years of droughts and drought emergency declarations have been made for most of the counties in southern Idaho. Coping with water shortages usually entails careful management of water rights held by farmers, irrigators, canal companies, utilities, governments, etc. Senior water rights take precedence over more junior ones, but deals are made and somehow the scarce water gets allocated to most users' satisfaction.

Water rights and the laws surrounding them have recently come into play in a big way with a "call for water," placed by a water user in South Central Idaho, which could have far-reaching impacts on agriculture, municipal water supplies, and other water uses. This call could have forced a shut-down of irrigation and municipal water pumps in the area. The action highlights a conflict among water right holders for groundwater (water in an underground aquifer that must be pumped to the surface) and surface water (stream water). Water rights are enforced by seniority, and Idaho's water right laws and policies consolidate ground and surface water under the same management framework. Generally, there is little conflict when there is plenty of water, but after years of drought/low water and slow aquifer recharging, that is no longer the case.

The Idaho Legislature took quick action and enacted a temporary solution. The problem is likely to occur again and a high priority has been given to further study the situation and to develop a more permanent resolution.

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State Table 1: February 2004 Labor Force (preliminary)

Seasonally Adjusted	Labor Force	Unemp.	% Unemp.	Total Emp.
Seaport LMA	36,349	1,303	3.6	35,046
Nez Perce County	23,795	742	3.1	23,053
Asotin County, WA	12,554	561	4.5	11,993
Boise City MSA	251,388	11,236	4.5	240,152
Ada County	179,556	6,542	3.6	173,014
Canyon County	71,833	4,694	6.5	67,139
Pocatello City MSA*	40,198	1,891	4.7	38,307
Bonneville LMA	85,150	2,983	3.5	82,167
Bingham County	22,492	921	4.1	21,570
Bonneville County	50,680	1,585	3.1	49,095
Butte County	1,603	86	5.3	1,517
Jefferson County	10,376	391	3.8	9,985
Cassia-Minidoka LMA	20,362	1,599	7.9	18,762
Cassia County	10,292	730	7.1	9,562
Minidoka County	10,070	870	8.6	9,200
Idaho-Lewis LMA	8,328	553	6.6	7,775
Idaho County	6,782	502	7.4	6,280
Lewis County	1,547	51	3.3	1,495
Panhandle LMA	93,323	6,351	6.8	86,972
Benewah County	4,258	370	8.7	3,888
Bonner County	18,009	1,113	6.2	16,896
Boundary County	4,459	300	6.7	4,159
Kootenai County	60,417	4,026	6.7	56,391
Shoshone County	6,180	542	8.8	5,638
Magic Valley LMA	58,165	2,301	4.0	55,864
Gooding County	8,100	271	3.4	7,829
Jerome County	10,841	434	4.0	10,407
Twin Falls County	39,224	1,595	4.1	37,629
Adams County	1,739	202	11.6	1,538
Bear Lake County	3,051	152	5.0	2,898
Blaine County	12,109	436	3.6	11,674
Boise County	2,601	131	5.0	2,470
Camas County	451	28	6.1	423
Caribou County	3,268	260	8.0	3,007
Clark County	586	36	6.2	550
Clearwater County	3,733	376	10.1	3,357
Custer County	2,197	167	7.6	2,029
Elmore County	9,561	493	5.2	9,068
Franklin County	5,387	180	3.3	5,207
Fremont County	4,995	295	5.9	4,700
Gem County	5,799	340	5.9	5,458
Latah County	16,227	440	2.7	15,787
Lemhi County	3,852	244	6.3	3,609
Lincoln County	2,149	112	5.2	2,037
Madison County	11,710	206	1.8	11,504
Oneida County	1,730	56	3.2	1,675
Owyhee County	3,848	66	1.7	3,781
Payette County	9,713	764	7.9	8,949
Power County	3,299	268	8.1	3,031
Teton County	3,787	169	4.5	3,618
Valley County	3,930	277	7.0	3,653
Washington County	4,237	382	9.0	3,856
State of Idaho	700,668	33,737	4.8	666,931
Idaho Cities				
Boise	113,334	3,984	3.5	109,350
Coeur d'Alene	21,459	1,083	5.0	20,376
Idaho Falls	30,832	1,024	3.3	29,808
Lewiston	20,430	558	2.7	19,872
Nampa	22,021	1,506	6.8	20,515
Pocatello	29,202	1,351	4.6	27,851
Twin Falls	20,708	876	4.2	19,833

* Pocatello MSA includes all of Bannock County.

State Table 2: Nonfarm Payroll Jobs

BY PLACE OF WORK	% Change From				
	Feb 2004*	Jan 2004	Feb 2003	Last Month	Last Year
Nonfarm Payroll Jobs**	565,800	561,000	556,500	0.9	1.7
GOODS-PRODUCING INDUSTRIES	96,200	96,700	98,100	-0.5	-1.9
Natural Resources & Mining	3,300	3,500	3,200	-5.7	3.1
Logging	1,700	1,800	1,700	-5.6	0.0
Mining	1,600	1,700	1,500	-5.9	6.7
Metal Ore Mining	400	500	500	-20.0	-20.0
Construction	32,500	32,800	32,000	-0.9	1.6
Manufacturing	60,400	60,400	62,900	0.0	-4.0
Durable Goods	36,800	36,900	39,100	-0.3	-5.9
Wood Product Manufacturing	6,800	6,800	7,400	0.0	-8.1
Sawmills & Wood Preservation	2,800	2,800	3,100	0.0	-9.7
Veneer & Engineered Products	1,100	1,100	1,200	0.0	-8.3
Other Wood Product Manufacturing	2,900	2,900	3,100	0.0	-6.5
Fabricated Metal Product Manufacturing	3,400	3,400	3,500	0.0	-2.9
Machinery Manufacturing	2,500	2,500	2,700	0.0	-7.4
Computer & Electronic Product Manufacturing	16,500	16,500	17,200	0.0	-4.1
Transportation Equipment Manufacturing	2,200	2,100	2,200	4.8	0.0
Other Durable Goods	5,400	5,600	6,100	-3.6	-11.5
Nondurable Goods	23,600	23,500	23,800	0.4	-0.8
Food Manufacturing	15,700	15,600	15,800	0.6	-0.6
Fruits & Vegetable Preserving & Specialty	7,400	7,400	7,700	0.0	-3.9
Paper Manufacturing	1,600	1,600	1,600	0.0	0.0
Printing & Related Support Activities	2,100	2,100	2,100	0.0	0.0
Chemical Manufacturing	1,700	1,700	1,800	0.0	-5.6
Other Nondurable Goods	2,500	2,500	2,500	0.0	0.0
SERVICE-PROVIDING INDUSTRIES	469,600	464,300	458,400	1.1	2.4
Trade, Transportation, & Utilities	113,900	114,400	113,000	-0.4	0.8
Trade	95,400	95,800	94,500	-0.4	1.0
Wholesale Trade	23,900	23,900	24,400	0.0	-2.0
Wholesalers, Durable Goods	11,000	10,900	11,300	0.9	-2.7
Wholesalers, Nondurable Goods	11,100	10,900	11,100	1.8	0.0
Retail Trade	71,500	71,900	70,100	-0.6	2.0
Motor Vehicle and Parts Dealers	10,800	10,800	10,500	0.0	2.9
Building Material and Garden Equipment	7,300	7,100	6,900	2.8	5.8
Food & Beverage Stores	12,200	12,100	12,100	0.8	0.8
General Merchandise Stores	15,000	15,200	14,500	-1.3	3.4
Transportation, Warehousing, & Utilities	18,500	18,600	18,500	-0.5	0.0
Utilities	1,800	1,800	1,900	0.0	-5.3
Transportation & Warehousing	16,700	16,800	16,600	-0.6	0.6
Rail Transportation	1,300	1,300	1,300	0.0	0.0
Truck Transportation	8,200	8,200	8,100	0.0	1.2
Information	9,200	9,100	9,100	1.1	1.1
Telecommunications	3,300	3,300	3,200	0.0	3.1
Financial Activities	27,000	27,000	26,100	0.0	3.4
Finance & Insurance	20,300	20,300	19,700	0.0	3.0
Real Estate & Rental & Leasing	6,700	6,700	6,400	0.0	4.7
Professional & Business Services	68,900	68,500	67,000	0.6	2.8
Professional, Scientific, & Technical	29,100	29,000	28,700	0.3	1.4
Scientific Research & Development	7,200	7,200	7,400	0.0	-2.7
Management of Companies & Enterprises	7,300	7,200	7,300	1.4	0.0
Administrative & Support & Waste Management	32,500	32,300	31,000	0.6	4.8
Administrative & Support Services	31,500	31,500	30,000	0.0	5.0
Educational & Health Services	65,000	64,100	61,400	1.4	5.9
Educational Services	8,100	7,400	7,300	9.5	11.0
Health Care & Social Assistance	56,900	56,700	54,100	0.4	5.2
Hospitals	13,600	13,600	13,000	0.0	4.6
Leisure & Hospitality	52,100	51,700	51,400	0.8	1.4
Arts, Entertainment, & Recreation	6,900	6,900	6,600	0.0	4.5
Accommodation & Food Services	45,200	44,800	44,800	0.9	0.9
Accommodation	7,300	7,200	7,400	1.4	-1.4
Food Services & Drinking Places	37,900	37,600	37,400	0.8	1.3
Other Services	17,900	17,800	17,800	0.6	0.6
Total Government	115,600	111,700	112,600	3.5	2.7
Federal Government	12,700	12,600	12,600	0.8	0.8
State & Local Government	102,900	99,100	100,000	3.8	2.9
State Government	31,100	28,400	28,600	9.5	8.7
State Government Education	14,900	12,600	14,000	18.3	6.4
State Government Administration	16,200	15,800	14,600	2.5	11.0
Local Government	71,800	70,700	71,400	1.6	0.6
Local Government Education	36,900	36,000	37,900	2.5	-2.6
Local Government Administration	32,000	31,800	30,700	0.6	4.2
Local Government Tribes	2,900	2,900	2,800	0.0	3.6

*Preliminary Estimate

** Estimates include all full or part time wage and salary workers who worked or received pay in the following industry groups during the pay period ending nearest the 12th of the month.

State Table 3: Economic Indicators

				% Change From	
	Feb 2004	Jan 2004	Feb 2003	Last Month	Last Year
IDAHO LABOR FORCE ⁽¹⁾					
Seasonally Adjusted					
Civilian Labor Force	700,600	697,100	689,800	0.5	1.6
Unemployment	33,700	32,900	38,300	2.4	-12.0
Percent of Labor Force Unemployed	4.8	4.7	5.6		
Total Employment	666,900	664,200	651,500	0.4	2.4
Unadjusted					
Civilian Labor Force	692,200	687,400	681,400	0.7	1.6
Unemployment	42,200	41,500	46,800	1.7	-9.8
Percent of Labor Force Unemployed	6.1	6.0	6.9		
Total Employment	650,000	645,900	634,600	0.6	2.4
U. S. UNEMPLOYMENT RATE ⁽²⁾	5.6	5.6	5.9		
U.S. CONSUMER PRICE INDEX ⁽²⁾					
Urban Wage Earners & Clerical Workers (CPI-W)	181.9	180.9	179.2	0.6	1.5
All Urban Consumer (CPI-U)	186.2	185.2	183.1	0.5	1.7
AGRICULTURE					
Agriculture Employment	33,390	32,610	30,720	2.4	8.7
Operators	9,740	9,740	9,010	0.0	8.1
Unpaid Family	360	360	360	0.0	0.0
Hired Workers	23,290	22,510	21,350	3.5	9.1
UNEMPLOYMENT INSURANCE					
Claims Activities					
Initial Claims ⁽³⁾	10,306	14,267	14,302	-27.8	-27.9
Weeks Claimed ⁽⁴⁾	110,299	118,083	125,508	-6.6	-12.1
Benefit Payment Activities⁽⁵⁾					
Weeks Compensated	96,117	98,769	109,469	-2.7	-12.2
Total Benefit \$ Paid	\$21,548,714	\$22,307,208	\$24,354,097	-3.4	-11.5
Average Weekly Benefit Amount	\$224.19	\$225.85	\$222.47	-0.7	0.8
Covered Employers	42,329	42,026	40,805	0.7	3.7
Total Benefit \$ Paid During Last 12 Months ⁽⁴⁾	\$215,965,902	\$218,771,285	\$215,282,957	-1.3	0.3
(1) Preliminary Estimate					
(2) Source: U.S. Bureau of Labor Statistics					
(3) Includes all entitlements/programs on Intrastate and Interstate Agent, New, and Additional Claims					
(4) Includes all entitlements/programs, Intrastate and Interstate Agent					
(5) Includes all entitlements/programs, Total Liable Activities					

IDAHO EMPLOYMENT Index–2003

Each year, we provide an index to the topics covered in the previous year's **Idaho Employment** newsletters as a reference source for our readers. Archives of past year's newsletters are available online at <http://www.jobservice.us/lmi/pubs/idempnews/ldempmenu.htm>.

REGULAR FEATURES

Data Tables

- Each issue of *Idaho Employment* contains standard data tables. Current month, previous month, and year-ago data are included. There usually is a two-month time difference between the date of the newsletter and the data series month, i.e., the November newsletter contains September data.
- Labor Force Statistics: Civilian Labor Force, Total Employment, Number Unemployed, and Unemployment Rate. Tables are for the state, labor market areas, counties, and major cities.
- U.S. Unemployment Rate
- Nonfarm Employment by Industry: (also known as Nonfarm Payroll Jobs) state and area tables for the month, previous month, and year-ago month. State data is more detailed than area data.
- Agricultural Employment: State data.
- Unemployment Insurance Program Statistics: Claims and Benefit Payment activities. State data.

Narrative Analyses

Each newsletter provides a discussion of state and area labor market developments and reasons for them. Employment changes, business highlights in the area's counties, and other items of labor market interest are included. Six different area newsletters are prepared and included in each issue of *Idaho Employment*.

A *For Your Information* section is an intermittent feature and contains data that is released periodically, such as Personal Income statistics, or articles prepared in response to frequently asked questions, or current events affecting Idaho's labor market. The topical index is a list of items contained primarily in the FYI section.

Topical Index

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PANHANDLE

BENEWAH, BONNER, BOUNDARY, KOOTENAI, & SHOSHONE COUNTIES

EMPLOYMENT NEWS

For workers in the Panhandle, February generally is the worst month of the year. This February was a stunning exception, especially in Kootenai County. The opening of a Verizon directory assistance center in Coeur d'Alene, the opening of the Northpoint Financial Group center in Smelterville, the reopening of the Center Partners call center in Coeur d'Alene that had closed at the end of December, and the hiring for a Costco store scheduled to open in April created 575 new job openings. In addition to the unexpected bounty of job openings, fewer people were laid off between January and February than normal. Weather conditions gave loggers, construction workers, and ski resort employees what they wished for—great snow on the mountains, but fairly warm, dry conditions at lower elevations. The net result of many more openings and fewer layoffs than normally occur in February was to push the seasonally adjusted unemployment rate from 7.0 percent in January to 6.8 percent in February.

Although the unusual conditions persisted into March, it is not likely that the unemployment rate will remain so low in the next few months. And even though the economy has picked up, many Panhandle residents remain unemployed. Unadjusted labor force statistics show 9.4 percent of the Panhandle's labor force was unemployed in February when 8,640 residents were unemployed and actively seeking work. In addition, many of the Panhandle residents who found employment between February 2003 and February 2004 regard their current work as a temporary stopgap. In many cases, they are working fewer hours or at jobs for which they are vastly overqualified. Even if they are working only a few hours a month for pay or profit, people are counted as *employed* even if they still consider themselves *unemployed*.

It's not that economic conditions haven't improved during the last 12 months. They have improved enough to bring the Panhandle's labor market back to normal. Relatively high unemployment is the norm for the Panhandle because of the constant movement of population into the Panhandle, and the high rate of unem-

Panhandle Table 1: Labor Force & Employment

	Feb 2004*	Jan 2004	Feb 2003	% Change From	
				Last Month	Last Year
INDIVIDUALS BY PLACE OF RESIDENCE					
Seasonally Adjusted					
Civilian Labor Force	93,320	92,160	91,710	1.3	1.8
Unemployed	6,350	6,430	7,150	-1.2	-11.2
% of Labor Force Unemployed	6.8	7.0	7.8		
Total Employment	86,970	85,730	84,560	1.4	2.9
Unadjusted					
Civilian Labor Force	92,020	91,360	90,500	0.7	1.7
Unemployed	8,640	8,390	9,470	3.0	-8.8
% of Labor Force Unemployed	9.4	9.2	10.5		
Total Employment	83,380	82,970	81,030	0.5	2.9
JOB BY PLACE OF WORK					
Nonfarm Payroll Jobs** - NAICS	67,270	67,000	65,950	0.4	2.0
Goods-Producing Industries	12,530	12,730	12,210	-1.6	2.6
Natural Resources & Mining	1,350	1,400	1,320	-3.6	2.3
Construction	4,090	4,250	3,770	-3.8	8.5
Manufacturing	7,090	7,080	7,120	0.1	-0.4
Wood Product Manufacturing	2,660	2,650	2,880	0.4	-7.6
Other Manufacturing	4,430	4,430	4,240	0.0	4.5
Service-Providing Industries	54,740	54,270	53,740	0.9	1.9
Trade, Transportation, & Utilities	13,180	13,350	13,000	-1.3	1.4
Wholesale Trade	1,300	1,330	1,310	-2.3	-0.8
Retail Trade	10,050	10,200	9,950	-1.5	1.0
Utilities	390	390	380	0.0	2.6
Transportation & Warehousing	1,440	1,430	1,360	0.7	5.9
Information	1,170	1,110	1,100	5.4	6.4
Financial Activities	2,910	2,860	2,780	1.7	4.7
Professional & Business Services	5,930	5,890	6,210	0.7	-4.5
Educational & Health Services	6,850	6,740	6,610	1.6	3.6
Leisure & Hospitality	7,740	7,620	7,400	1.6	4.6
Other Services	2,170	2,110	2,170	2.8	0.0
Government Education	5,300	5,090	5,170	4.1	2.5
Government Administration	8,290	8,300	8,170	-0.1	1.5
Government Tribes	1,200	1,200	1,130	0.0	6.2

* Preliminary estimate

**Full- or part-time jobs of people who worked for or received wages in the pay period including the 12th of the month

ployment is normal in the winter and spring months due to the strong seasonality of the local economy. Census population estimates, Job Service records, driver's license data, school enrollments, and other sources all show that people are continuing to move to the area in large numbers. The net result is that the job market hasn't improved quite as much as the February seasonally adjusted unemployment rate suggests. For employers in most industries, that means labor continues to be available at relatively low wage rates.

AREA DEVELOPMENTS

Bonner County

- Some time this year, Riley Creek Lumber will close the Sandpoint lumber finishing plant it purchased from Louisiana-Pacific (L-P) last fall and move the 70 jobs 40 minutes away to its Chilco sawmill along Highway 95 near Athol. The Chilco sawmill, also previously owned by L-P, currently employs 80 people. The consolidation of the operations will reduce costs.

Originally the Sandpoint plant, which includes a planer, served three L-P mills. Chilco is the only remaining mill using the finishing plant. Sandpoint workers will have the option of transferring to Chilco or applying for openings at the Moyie Springs mill in Boundary County or the Laclede mill in Bonner County. The Sandpoint plant's location is likely to be of great interest to other businesses because it includes 26 acres near the Sandpoint airport, Highway 95, and rail access.

- Clark Fork businessman Tom Williams has big dreams for Clark Fork, a city of 560 residents near the Montana border. On March 19, Williams, the executive director of the Clark Fork Economic Development Corporation (CFEDC), hosted a public meeting at a site where he is developing a business incubator for artisans that eventually may encompass 17 buildings and employ 60 people. Currently, the site contains two buildings—the Lone Wolf Trading Post and the temporary headquarters for CFEDC. The site's theme is old West mining town. Williams plans to create a place where local artisans and crafters can make and sell their wares, and tourists can come watch them work as well as buy their wares.
- Ponderay, a city of 670 residents immediately north of Sandpoint, bills itself as "the little city with the big future." More than 1,500 people work in the city, which is home to eight manufacturing businesses and a retail area centered on the Bonner Mall—the largest shopping center in Bonner County. Ponderay recently earned its Idaho Gem Community certification after making an extensive community development plan with assistance from the Idaho Department of Commerce. It also established the Ponderay Community Development Corporation to help make its development plans become reality. On August 28, it will celebrate Ponderay Day.

Kootenai County

- Coeur d'Alene moviegoers are looking forward to the completion of a 14-screen cinema that just broke ground at the Riverstone development between Northwest Boulevard and the Spokane River. The cinema is slated for completion in early 2005 and will be operated by the national Regal Cinema chain. The cinema will anchor a nine-building entertainment, retail, and restaurant complex.
- Riverstone developer John Stone recently purchased 77 acres from Central Pre-Mix, bringing the total area of the Riverstone development to 150 acres. Riverstone already is home to several commercial office buildings, and it soon will begin to market residential waterfront lots and the 331 condominium units it plans to build there.
- Kimmel Corporation, a six-year-old company at 1677 East Miles Avenue in Hayden Lake, makes TitleSearch, a software package that helps title insurance companies quickly detect liens and easements on building titles. It currently is hiring 15 workers, bringing its total employment up to 50 workers.
- Jobs Plus, Kootenai County's nonprofit economic development organization, recently convinced All Wall

Contracting to move from the Spokane Valley to the Idaho side of the border. The company recently moved to Riverbend Commerce Park in Post Falls where it will enjoy large savings on workers' compensation, unemployment insurance, business liability insurance, and labor costs. The metal framing, drywall, and painting contractor employs 120 employees. All Wall's current projects include new buildings for Coeur d'Alene's alternative high school, Shoshone Medical Center, and Bonners Ferry High School.

Shoshone County

- While still enjoying a great ski season, Silver Mountain Resort in Kellogg broke ground on its 64-unit Morning Star Lodge condominiums in late March. Within a week, all the condo units were sold. The first building should be completed before the beginning of the next ski season. The second building will be completed about two months later. The condo buildings will be the first phase of the resort's long-term expansion plans that include the creation of a retail village, the addition of ski terrain, and the development of a golf course near the gondola base in Kellogg. The retail village near the gondola base will include 10,000-square feet of space for shops, professional offices, and skier services. Recent praise for Silver Mountain in ski magazines has greatly increased interest in the resort and its ski hill, which is served by the world's longest gondola. Residents of the Silver Valley are thrilled by the growing interest in the valley shown by skiers, trail buffs, retirees, and housing speculators.
- Dave Smith Motors, the automotive dealership that is Shoshone County's largest employer, hired 15 new sales people in March, bringing its employment close to 300 people. In April, the dealership broke ground on a new nine-bay detail shop next to its current parts and service department on Cameron Avenue in Kellogg. When the shop opens, the dealership will hire five new employees. Next to the new detail shop, a two-story building soon will be under construction. The new building will hold a GM showroom, a customer service lounge, a parts department, and more sales office space. The dealership plans to reconstruct the former Sunnyside Elementary School Building into an eatery serving healthy food for its employees and the public. It also is putting in a Mopar Speed Shop—a Chrysler parts showroom specializing in performance parts. In 2003, the dealership sold 7,000 new and 3,000 used vehicles; it was the number one Dodge Dealer in the world, the number one Chrysler dealer in the world, and the number one GM dealer in the Northwest. Many times a week, it shuttles potential vehicle purchasers, who love its one-price system, from the Spokane Airport 77 miles to Kellogg. It likely draws more than 20,000 people a year to Kellogg just to buy cars and trucks.

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SEAPORT

NORTH CENTRAL IDAHO: CLEARWATER, IDAHO, LATAH, LEWIS, & NEZ PERCE COUNTIES

EMPLOYMENT TRENDS

In February, Seaport's *Nonfarm Payroll Jobs* increased by 120 from January 2004, rising from 26,160 to 26,280. From February 2003, a decrease of 560 was recorded. February's month-over-month increase, though slight, was still welcome when year-over-year decreases were recorded. *Construction, Professional & Business Services*, and *Education* all posted increases that were not anticipated and brightened the local economic picture.

SPECIAL TOPIC: Covered Employers

Covered employers include all employers covered by Idaho's Unemployment Insurance law. This law covers approximately 92 percent of employers in Idaho. The number of employers decreased in two of the largest counties in North Central Idaho, Latah and Nez Perce Counties, between 1999 and 2003, as shown in Seaport Table 2. Although the total number of covered employees for the region decreased from 1999 to 2003, new employers are emerging. A common trend throughout North Central Idaho is that most new employers are small, with fewer than 10 employees. The number of large employers, those with 100 or more employees, has decreased in the past five years.

AREA DEVELOPMENTS

Clearwater County

- Watco Companies, Inc., of Pittsburg, Kansas, purchased the Camas Prairie RailNet and began operations in Clearwater County on March 1, renaming the line to the Great Northwest Railroad. The 177-mile line runs from Riparia, Washington, to Lewiston, then continues to Kooskia and Orofino. Watco Companies have been operating the largest shortline railroad in Idaho, the Eastern Idaho Railroad headquartered in Twin Falls, and the largest shortline in Washington, the Palouse River & Couleee City Railroad headquartered in Rosalia, Washington. "We have operated railroads in Idaho and Washington for 14 years and believe in the customers, the communities, and the future of this region of Amer-

Seaport Table 1: Labor Force & Employment
Nez Perce County, Idaho and Asotin County, Washington

	Feb 2004*	Jan 2004	Feb 2003	% Change From	
				Last Month	Last Year
INDIVIDUALS BY PLACE OF RESIDENCE					
Seasonally Adjusted					
Civilian Labor Force	36,350	36,130	36,610	0.6	-0.7
Unemployment	1,300	1,240	1,400	4.8	-7.1
% of Labor Force Unemployed	3.6	3.4	3.8		
Total Employment	35,050	34,890	35,210	0.5	-0.5
Unadjusted					
Civilian Labor Force	36,510	36,260	36,730	0.7	-0.6
Unemployment	1,700	1,630	1,820	4.3	-6.6
% of Labor Force Unemployed	4.7	4.5	5.0		
Total Employment	34,810	34,630	34,910	0.5	-0.3
JOBS BY PLACE OF WORK					
Nonfarm Payroll Jobs** - NAICS	26,280	26,160	26,840	0.5	-2.1
Goods-Producing Industries	4,340	4,310	4,280	0.7	1.4
Natural Resources & Mining	210	210	200	0.0	5.0
Construction	970	930	980	4.3	-1.0
Manufacturing	3,160	3,170	3,100	-0.3	1.9
Wood Product Manufacturing	550	560	590	-1.8	-6.8
Food Manufacturing	50	60	90	-16.7	-44.4
Paper Manufacturing	1,200	1,200	1,130	0.0	6.2
Other Manufacturing	1,360	1,350	1,290	0.7	5.4
Service-Providing Industries	21,940	21,850	22,560	0.4	-2.7
Trade, Transportation & Utilities	5,370	5,420	5,380	-0.9	-0.2
Wholesale Trade	600	590	640	1.7	-6.3
Retail Trade	3,530	3,570	3,470	-1.1	1.7
Utilities	90	90	80	0.0	12.5
Transportation & Warehousing	1,150	1,170	1,190	-1.7	-3.4
Information	350	350	380	0.0	-7.9
Financial Activities	1,830	1,820	1,860	0.5	-1.6
Professional & Business Services	1,380	1,330	1,400	3.8	-1.4
Education & Health Services	3,940	3,910	3,990	0.8	-1.3
Leisure & Hospitality	2,490	2,470	2,480	0.8	0.4
Other Services	1,070	1,040	1,080	2.9	-0.9
Government Education	2,300	2,260	2,470	1.8	-6.9
Government Administration	2,340	2,380	2,720	-1.7	-14.0
Government Tribes	870	870	800	0.0	8.8

*Preliminary Estimate

**Full- or part-time jobs of people who worked for or received wages in the pay period including the 12th of the month

Seaport Table 2: Number of Covered Employers by County/Area and Year in North Central Idaho.

County/Area	1999	2000	2001	2002	2003
CLEARWATER	340	344	345	339	343
IDAHO	552	554	569	567	576
LATAH	1,015	988	976	951	982
LEWIS	168	168	175	175	174
NEZ PERCE	1,341	1,326	1,310	1,298	1,286
North Central Idaho TOTAL	3,415	3,380	3,374	3,329	3,361

ica," said Rick Webb, Watco's President and CEO. Watco Companies operates shortline railroads and railroad services in 23 states with more than 900 employees. Founded in 1983, Watco is one of the largest privately held railroad companies in the United States.

Idaho & Lewis Counties

- Work is progressing on the Clearwater Basin Project Act (Senate Bill 433), Idaho legislation designed to provide for enhanced forest stewardship management within the Clearwater and Nez Perce National Forests. The act is modeled after the Resource Advisory Committees (RACs), established by the Craig-Wyden Bill and by recommendations from Idaho's Federal Lands Task Force. S. 433 would empower a committee of local residents and experts to work with the U.S. Forest Service to direct management of 2.7 million acres of national forest. "This legislation offers a solution to the problems that involves the local residents—those who know the forest best," said Idaho Senator Larry Craig, one of the act sponsors. An infestation of mountain pine beetles has killed several trees and has been steadily increasing in the Elk City area. This results in increased fuel loads that could spark dangerous fires and adds to forest health concerns.
- Late in summer 2004 trains will again be traversing the canyons from Spalding to Cottonwood, according to Stan Patterson, manager of the BG&CM Railroad. Though the schedule to reopen the line has experienced delays, Patterson said a realistic goal is to be operational for harvest this fall. Patterson and his business partner, Cody Dodson, have contracted with line owner Mike Williams to operate a freight train on the historic line. The line was abandoned in September 2000 by Camas Prairie RailNet, which continued to operate the lines east of Lewiston to Jaype and Kooskia. Watco Companies purchased those lines in early March, changing the name to Great Northwest Railroad. The biggest problem holding up the BG&CM, Patterson said, is the locomotive purchased to run on the Camas Prairie line was first temporarily lost by Burlington Northern-Santa Fe. "They had to move it from one side of Kansas City to the other and they lost it," he said. When it was found, inspection in the shop showed the engine was in need of more repair work than originally planned, which further delayed the project.

Latah County

- With record high prices of gasoline and diesel affecting motorists across the nation, it's no wonder some people are attracted to the idea of growing their own fuel. As the technology of the alternative fuel called biodiesel continues to evolve, the possibility of producing it may become a reality. Biodiesel is used at the University of Idaho (UI) where it powers university vehicles and the Vandal Trolley, which is used for special events. The UI biodiesel program uses oil

extracted from mustard seed. Soybeans and waste fats from restaurants and rendering plants also can be used as biodiesel oil sources. At a recent biodiesel symposium at UI, petroleum geologist Ken Deffeyes of Princeton University said, "It looks like the world is now, or will soon be, on the downhill side of the petroleum era." As supplies decrease, prices can be expected to rise and even spike upward from time to time. A particularly cold winter in the Northeast or further trouble in the Middle East, for example, will mean a rapid movement upward in prices, Deffeyes said. "It's part of what economists call 'queuing theory.' As supply reaches its maximum, and demand is eating up all that supply, you either have nobody waiting in line (for fuel) or else everybody is lined up for it," Deffeyes said. "I like to say that the good news is that Saudi Arabia is no longer controlling the world price of oil. But the bad news is that nobody is controlling the price of oil." Because biodiesel is not derived from petroleum, it is insulated from the predicted decline in world petroleum production. Although the price of biodiesel is relatively high, it may become cheaper relative to petroleum diesel, and its price also may be more constant, Deffeyes said.

Nez Perce County

- Regence BlueShield of Idaho, one of Lewiston's largest private employers, has lost the medical insurance contract for the state of Idaho to Blue Cross of Idaho, a Boise competitor. The contract covers 48,000 people, including those who work at state correctional institutions, Idaho Department of Health and Welfare, and all Idaho institutions of higher learning other than the University of Idaho. The state contract has been Regence's largest in Idaho and will become the largest of Blue Cross of Idaho, according to spokeswoman of the two insurance providers. Regence has held the contract since the mid-1970s. The state contract represented about 18 percent of Regence's 260,000 customers in 2003. If Regence doesn't find replacement customers, the loss will lower Regence's customer base to about the level of the early 1990s.
- In a related development, Regence officials have said that no decision has been made about the future of the proposed 55,000-square-foot office at the Port of Lewiston Technology Park, south of Home Depot. Last fall when John Stellmon took over as president of Regence BlueShield of Idaho, he said Regence expected to decide on the project this spring. The building is supposed to house employees from Regence's Bryden Avenue location in Lewiston. It would also have 100 to 150 new employees that would serve new accounts from Regence affiliates in Idaho, Washington, Oregon and Utah.

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TREASURE VALLEY

ADA, ADAMS, BOISE, CANYON, ELMORE, GEM, OWYHEE, PAYETTE, VALLEY, & WASHINGTON COUNTIES

EMPLOYMENT TRENDS

The Boise City Metropolitan Statistical Area's (MSA) average annual unemployment rate for February 2004 was 4.5 percent, as shown in Treasure Valley Table 1. This was two-tenths of a percentage point above the January 2004 rate of 4.3 percent and nine-tenths of a percentage point below the February 2003 rate of 5.4 percent. Month-over-month, the number of employed persons increased by 600, or 0.3 percent, from January 2004 and the number of unemployed individuals increased by 500 individuals, or 4.7 percent. The increasing number of persons employed and the increasing number of persons unemployed created an overall increase of 1,100 individuals, or 0.4 percent, in the *Civilian Labor Force* from January 2004. Year-over-year, the number of employed persons increased by 6,300, or 2.7 percent, and the number of unemployed individuals, decreased by 2,100 individuals, or 15.8 percent, creating a net increase in the *Civilian Labor Force*, of 4,200 individuals, or 1.7 percent, in the *Civilian Labor Force*, from February 2003. The *Civilian Labor Force* figures for February 2004 for all ten counties in Southwest Idaho are shown in Treasure Valley Table 2.

Treasure Valley Table 2: February 2004 Seasonally Adjusted Labor Force Figures for Southwest Idaho Counties				
	Civilian Labor Force	Number Unem- ployed	Percent Unem- ployed	Number Employed
Ada	179,789	6,520	3.6	173,269
Adams	1,739	200	11.5	1,539
Boise	2,605	133	5.1	2,472
Canyon	71,934	4,696	6.5	67,239
Elmore	9,564	492	5.1	9,072
Gem	5,805	344	5.9	5,460
Owyhee	3,848	65	1.7	3,783
Payette	9,756	807	8.3	8,948
Valley	3,934	279	7.1	3,655
Washington	4,223	369	8.7	3,855
Statewide	699,600	33,281	4.8	666,319

Treasure Valley Table 1: Boise MSA Labor Force & Employment
Ada and Canyon Counties

	Feb 2004*	Jan 2004	Feb 2003	% Change	
				Last Month	Last Year
INDIVIDUALS BY PLACE OF RESIDENCE					
Seasonally Adjusted					
Civilian Labor Force	251,400	250,300	247,200	0.4	1.7
Unemployment	11,200	10,700	13,300	4.7	-15.8
% of Labor Force Unemployed	4.5	4.3	5.4		
Total Employment	240,200	239,600	233,900	0.3	2.7
Unadjusted					
Civilian Labor Force	250,400	248,700	246,100	0.7	1.7
Unemployment	13,000	13,200	15,000	-1.5	-13.3
% of Labor Force Unemployed	5.2	5.3	6.1		
Total Employment	237,400	235,500	231,100	0.8	2.7
JOBS BY PLACE OF WORK					
Nonfarm Payroll Jobs**	230,200	228,300	224,800	0.8	2.4
GOODS-PRODUCING INDUSTRIES					
Natural Resources & Construction	15,000	14,800	14,300	1.4	4.9
Manufacturing	29,800	29,700	30,600	0.3	-2.6
Durable Goods	22,900	22,700	23,500	0.9	-2.6
Wood Product Manufacturing	1,600	1,600	1,800	0.0	-11.1
Fabricated Metal Products Mfg.	1,300	1,300	1,400	0.0	-7.1
Machinery Manufacturing	1,100	1,100	1,200	0.0	-8.3
Computer & Electronic Manufacturing	14,700	14,700	15,500	0.0	-5.2
Transportation Equipment Mfg.	1,500	1,400	1,700	7.1	-11.8
Other Durable Goods	2,700	2,600	1,900	3.8	42.1
Nondurable Goods	6,900	7,000	7,100	-1.4	-2.8
Food Manufacturing	5,300	5,400	5,400	-1.9	-1.9
Printing & Related Support Activities	700	700	700	0.0	0.0
Other Nondurable Goods	900	900	1,000	0.0	-10.0
SERVICE-PROVIDING INDUSTRIES					
Trade, Transportation, & Utilities	43,900	43,900	43,100	0.0	1.9
Trade	36,900	36,900	36,100	0.0	2.2
Wholesale Trade	9,700	9,700	10,000	0.0	-3.0
Wholesalers, Durable Goods	6,000	6,000	6,400	0.0	-6.3
Wholesalers, Nondurable Goods	2,800	2,800	2,800	0.0	0.0
Retail Trade	27,200	27,200	26,100	0.0	4.2
Food & Beverage Stores	4,200	4,200	4,100	0.0	2.4
General Merchandise Stores	5,800	5,900	5,800	-1.7	0.0
All Other Retail Trade	17,200	17,100	16,200	0.6	6.2
Transportation, Warehousing, & Utilities	7,000	7,000	7,000	0.0	0.0
Utilities	600	600	700	0.0	-14.3
Transportation & Warehousing	6,400	6,400	6,300	0.0	1.6
Information	4,000	3,900	3,900	2.6	2.6
Telecommunications	1,400	1,400	1,400	0.0	0.0
Financial Activities	12,600	12,600	12,100	0.0	4.1
Finance & Insurance	9,300	9,300	9,100	0.0	2.2
Real Estate & Rental & Leasing	3,300	3,300	3,000	0.0	10.0
Professional & Business Services	32,200	32,000	30,700	0.6	4.9
Professional, Scientific, & Technical	10,500	10,500	10,100	0.0	4.0
Management of Companies & Ent.	5,400	5,500	5,500	-1.8	-1.8
Administrative & Support & Waste Mgmt.	16,300	16,000	15,100	1.9	7.9
Educational & Health Services	29,800	29,500	27,900	1.0	6.8
Educational Services	2,500	2,400	2,500	4.2	0.0
Health Care & Social Assistance	27,300	27,100	25,400	0.7	7.5
Hospitals	9,600	9,700	8,900	-1.0	7.9
Leisure & Hospitality	20,000	19,800	19,200	1.0	4.2
Arts, Entertainment, & Recreation	2,700	2,800	2,100	-3.6	28.6
Accommodation & Food Services	17,300	17,000	17,100	1.8	1.2
Accommodation	1,900	1,700	2,000	11.8	-5.0
Food Services & Drinking Places	15,400	15,300	15,100	0.7	2.0
Other Services	6,700	6,600	6,500	1.5	3.1
Total Government	36,200	35,500	36,500	2.0	-0.8
Federal Government	5,500	5,500	5,200	0.0	5.8
State & Local Government	30,700	30,000	31,300	2.3	-1.9
State Government	13,400	13,000	13,600	3.1	-1.5
State Government Education	4,100	3,800	4,200	7.9	-2.4
State Government Administration	9,300	9,200	9,400	1.1	-1.1
Local Government	17,300	17,000	17,700	1.8	-2.3
Local Government Education	11,000	10,700	10,700	2.8	2.8
Local Government Administration	6,300	6,300	7,000	0.0	-10.0

* Preliminary Estimate

**Full- or part-time jobs of people who worked for or received wages in the pay period including the 12th of the month

In the Boise City MSA *Nonfarm Payroll Jobs* decreased by 1,900 jobs, or 0.8 percent, in February 2004 while year-over-year, *Nonfarm Payroll Jobs* experienced a gain of 5,400 jobs, or 2.4 percent. Month-over-month, *Goods-Producing Industries* gained 300 jobs with job increases noted in *Natural Resources, Mining & Construction* (200 jobs), *Transportation Equipment Manufacturing* (100 jobs), and *Other Durable Goods Manufacturing* (100 jobs) while job losses were noted in *Food Product Manufacturing* (100 jobs). Year-over-year, *Goods-Producing Industries* lost 100 jobs with losses recorded in *Wood Product Manufacturing* (-200 jobs), *Fabricated Metal Products Manufacturing* (-100 jobs), *Machinery Manufacturing* (-100 jobs), *Computer & Electronic Product Manufacturing* (-800 jobs), *Transportation Equipment Manufacturing* (-200 jobs), *Food Product Manufacturing* (-100 jobs), and *Other Nondurable Goods Manufacturing* (-100 jobs) while job increases were noted in *Natural Resources, Mining, & Construction* (700 jobs) and *Other Durable Goods Manufacturing* (800 jobs).

In *Service-Providing Industries*, jobs gained outweighed jobs lost by 1,600 jobs in the Boise City MSA from January 2004 to February 2004. Job gains were experienced in *All Other Retail Trade* (100 jobs), *Information Services* (100 jobs), *Administrative & Support & Waste Management Services* (300 jobs), *Educational Services* (100 jobs), *Health Care & Social Assistance Services* (200 jobs), *Accommodation Services* (200 jobs), *Food Service & Drinking Places* (100 jobs), *Other Services* (100 jobs), *State Government Education* (300 jobs), *State Government Administration* (100 jobs), and *Local Government Education* (300 jobs). Job losses occurred in *General Merchandise Stores* (-100 jobs), *Management of Companies & Enterprise Services* (-100 jobs), *Hospitals* (-100 jobs), and *Arts, Entertainment, & Recreation Services* (-100 jobs). Year-over-year, *Service-Providing Industries* gained 5,500 jobs, or increased 3.1 percent. Job gains were noted in *Food & Beverage Stores* (100 jobs), *All Other Retail Trade* (1,000 jobs), *Transportation & Warehousing Services* (200 jobs), *Information Services* (100 jobs), *Finance & Insurance Services* (200 jobs), *Real Estate & Rental & Leasing Services* (300 jobs), *Professional, Scientific, & Technical Services* (400 jobs), *Administrative & Support & Waste Management Services* (1,200 jobs), *Health Care & Social Assistance Services* (1,900 jobs) including *Hospitals* (700 jobs), *Arts, Entertainment, & Recreation Services* (600 jobs), *Food Service & Drinking Places* (300 jobs), *Other Services* (200 jobs), *Federal Government* (300 jobs), and *Local Government Education* (300 jobs). Job losses were noted in *Durable Goods Wholesale Trade* (-400 jobs), *Utilities Services* (-100 jobs), *Management of Companies & Enterprise Services* (-100 jobs), *Accommodation Services* (-100 jobs), *State Government Education* (-100 jobs), *State Government Administration* (-100 jobs), and *Local Government Administration* (-700 jobs).

AREA DEVELOPMENTS

Boise City MSA

- Citi®Cards announced in early March that it would open a \$36 million customer service and collection service center in Meridian. The new facility would create at least 650 new jobs in the Treasure Valley. State government officials and local economic development agencies offered \$1.6 million in Workforce Development Training funds, investment tax credits, broadband tax credits, and job creation tax credits as incentives in the proposal to bring the service center to the area. Most of the new jobs created by Citi®Cards would pay \$9.00 to 10.00 per hour. Citi®Cards already employs nearly 1,100 people in Boise, currently operating in the former Sears, Roebuck and Co. customer service center on Emerald Street. Construction on the new 170,000-square-foot Citi®Cards facility started in March.
- Washington Group International (WGI) announced in early March that it recently acquired a \$1.5 billion, six-year contract to upgrade and maintain nine Michigan power plants. The contract gives WGI control over all improvements and maintenance projects at the power plants, which serves 2.1 million customers in southeastern Michigan. WGI also recently landed a \$750 million contract to build a new power plant in Wisconsin and two contracts valued at \$36.7 million for the management and maintenance of toll operations on the roadways from the Miami-Dade Expressway Authority in Florida.
- Fred Meyer announced plans to transfer its eastern regional office from Salt Lake City to Boise within the next few months. The regional office, one of six regional headquarters, will oversee 10 Fred Meyer stores in Idaho as well as a number of stores in eastern Washington.
- Construction of an 185,000-square-foot office building is scheduled to start on the northeast corner of 10th and Bannock Streets in Boise this fall. The 10 to 12-story building will include 9 to 11 stories of office space with retail shops on the ground level. Construction is scheduled for completion by fall 2005.
- Construction of three buildings is expected to start this spring on a 3.2-acre site at Emerald Street and Ancestor Place in Boise. The three buildings would total 42,000-square feet; one-quarter of the space will be used for office space and the rest as warehousing and storage space. The site could eventually be a 14-building complex. Construction of the three buildings should be finished this summer.

- St. Luke's Internal Medicine started construction of a fourth clinic in Ada County at 4840 North Cloverdale Road in west Boise. The 11,000-square-foot clinic is expected to open in October and will include an initial staff of four physicians.
- Hewlett-Packard (HP) announced in early-March that it signed a contract with Ford Motor Co. estimated to be worth more than \$100 million. The agreement is part of HP's effort in packaging its many products, which include more than 15,000 printing, copying, and facsimile devices, and services for 150,000 Ford employees. The deal affects many HP employees in Boise where most of the employees are involved in the printing and imaging division.
- A four-story hotel is planned for the southwest corner of Chinden Boulevard and Cloverdale Road in the Boise Research Center in west Boise. Construction is scheduled to begin in July on the 119-room Spring Hill Suites by Marriot. The 16,743-square-foot hotel will include an 800-square-foot conference room and an outdoor pool. The \$10.5 million project will be completed by June 2005.
- Meridian Soccer Property, LLC recently purchased 1.75 acres to construct an indoor soccer arena in the Stonebridge Business Park off East Franklin Road near Locust Grove Road in Meridian. The 22,000-square-foot arena will house the Idaho Soccer Center. A 2,000-square-foot attachment to the building will house a pro shop selling brands like Adidas, Nike, Diadora, and others. When complete, the center will have two or three full-time employees and several part-time employees based on the season. The soccer arena is scheduled to open in October.
- A 10,000-square-foot building, the Genesis Center, is currently under construction on the southeast corner of Franklin and Linder Roads in Meridian. Karate for Kids, a karate studio will anchor the building and occupy 6,000-square feet. Three additional lease spaces are available in the building. Construction is scheduled to be finished in late July or early August.
- Swift & Co. laid off 84 staff at its Nampa beef-processing plant in mid-March. The company eliminated about 15 percent of its jobs nationally. The company cited cattle shortages from the closure of the U.S. border with Canada as the main reason for the job cuts. Nationally, about 560 people have been affected by the layoff.
- The Nampa Police Department and Northwest Nazarene University (NNU) opened a new substation to serve the NNU campus and South Nampa. The former Ridgecrest Golf Course clubhouse was renovated as the substation; it is located at the corner of Maple Street and Colorado Avenue on the NNU Campus in Nampa.
- Contract manufacturer Plexus Corp., which has a facility in Nampa, recently announced plans to hire 1,000 employees throughout the organization. The majority of jobs will be located at Plexus locations throughout Asia, although the Nampa plant and others could be affected. Company officials stated that market demand would determine the number of jobs added to Nampa.
- A new 7,000-square-foot funeral chapel is planned for the south side of Nampa-Caldwell Boulevard at Moss Lane in Nampa. Construction was started on the Conner Family Funeral Chapel in March and should be finished by August. The two-story structure will be an old-fashioned Victorian building with a wraparound porch. The \$1 million facility will include a large room, two smaller chapels or visitation rooms, a rose garden, and a large parking area. When completed, the Conner Family Funeral Chapel will employ two people; additional staff will be added as needed.
- Clearwater Plaza, a new service-retail development is constructing another building at East Caldwell Boulevard in front of Wal-Mart in Caldwell. The 25,000-square-foot building will be able to accommodate several retail stores. Currently on the site, one building houses a Payless Shoe Source, Subway, Cottonwood Financial, the China Star takeout restaurant, and Electric Sun Tanning; another building houses Hollywood Video, Fantastic Sam's, Hometown Pizza, Kid Connection, and Up in Smoke. An Only \$1 Superstore is located in the same plaza.
- Carrington Center, a new commercial retail center, is under development at the southeast corner of 10th Avenue and Ustick Road in Caldwell. The developer's plan includes an anchor business—perhaps a mid-sized grocery store—with hopes to include two small buildings for other businesses. No businesses have been signed to fill the spots. A Maverick Country Store was built on the corner of the new development and opened on March 12.
- Recent business happenings in the Boise City MSA include: Barber Park broke ground on a \$516,000

project to widen roads and increase parking for area rafters; Java, a Ketchum espresso and food company, announced plans to open an 1,800-square-foot coffee shop in May in downtown Boise; Science Applications International Corp. expanded in the new BoDo development in downtown Boise; Petersen-Staggs Architects relocated to a new office building on State Street in Boise; Waxie Sanitary Supply opened a new location on South Cole Road in Boise; the Ruth Melichar Bird Center announced plans to reopen in mid-April; Lance, Elia & Associates, PLLC opened a new law firm on Shoreline Drive in Boise; Julia Elzie Travel Design, a concierge-style travel consulting firm, opened in Boise; the Idaho Youth Ranch (IYR) purchased land south of its thrift store on Orchard Street in Boise. IYR will use the site as an auto sales lot; Goldy's of Hyde Park closed its popular breakfast bistro in late February. The site now houses Richard's Bakery and Cafe; Screamin' Toad Cycles closed its Hyde Park location; Easy Cookin' moved from its location in Boise Towne Square Mall to a new location in the Overland Park Shopping Center in Boise; Little Caesars opened a pizzeria in Cherry Plaza on Fairview Avenue and Main Street in Meridian; the Lo-Carb Café and Market announced plans to open an exclusively low-carb restaurant and market on Fairview Avenue, west of Eagle Road, at the end of April; Bank of America announced plans to open a new branch at Karcher Crossing in Nampa in June; Jag Tool and Equipment started construction on a new building on Karcher Road in Nampa; Quizno's opened its first Nampa shop in the Neon Plaza on Nampa-Caldwell Boulevard in Nampa; Coldstone Creamery opened in the Neon Plaza on Nampa-Caldwell Boulevard in Nampa; Holly Nursing and Rehab Center, a Hospice Care Center, opened on 12th Avenue in Nampa; Features by Francis opened at a new shop on Cleveland Boulevard in Caldwell; Commercial Kitchen, the University of Idaho Food Technology Center shared use kitchen, opened in early April in Caldwell; and the Rooster's Roast Coffee House opened on Kimball next to Kelly's Cards & Gifts in Caldwell.

Elmore County

- A new pitched roof was installed on the Main Street fire station in Mountain Home in mid-March. The old flat roof was repaired many times, but often continued to leak. Mountain Home mayor and city council declared the situation an emergency to expedite the project.

Payette County

- Java Jungle, an espresso and coffee shop, opened in late January at 24 North Main Street in Payette. Java Jungle serves juices, sodas, smoothies, blender drinks, espressos, mochas, coffees, soymilk, chai teas, Xanadu fine teas, Panache coffees, and gourmet cocoa. The food menu includes muffins, bagels, cookies, popcorn, cup of noodles, and chips. A deli bar is planned for the future. The shop opens at 6:30 a.m. Monday through Saturday.
- The Payette County Recreation District will host a bond election May 25. The bond will pay for a \$13.8 million recreation center if it passes. The two-story, 100,000-square-foot facility would include a senior citizen center, a day care center, meeting rooms, a lunch area with concessions, two full-sized basketball courts, locker rooms, an elevated walking and jogging track, racquetball courts, a climbing wall, a three-lane lap pool, a sauna, a Jacuzzi, a weight room with free weights, and space for aerobic exercise machines. The \$13.8 million would pay for site development, all construction fees and permits, furnishings, landscaping, and equipment.

Valley County

- Cellular One recently opened a store in the Marketplace between Ridley's and Rite Aid in McCall. Cellular One specializes in reaching rural areas and has provided service in the area for years, but only sold phones and service plans through other businesses.
- Tamarack began taking reservations in early March for its second offering of home sites and chalet homes that will be released for sale later this year. Included in the list of 54 properties offered are 36 golf estate home sites, 7 sites for custom chalets, and 11 resort-built 3-bedroom chalets. The resort is also resuming construction on the golf course and planning for the installation of five ski lifts that will be installed this summer.

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MAGIC VALLEY

BLAINE, CAMAS, CASSIA, GOODING, JEROME, LINCOLN, MINIDOKA, & TWIN FALLS COUNTIES

EMPLOYMENT TRENDS

The seasonally adjusted unemployment rate was 4.0 percent for the Magic Valley Labor Market Area (LMA) for February 2004. This was two-tenths of a percentage point higher than January 2004 and one-tenth of a percentage point higher than February 2003. *Civilian Labor Force* showed a strong growth of 3,960 or 7.3 percent year-over year. Unemployment continues to be very stable. The small upturn in unemployment rate was due to extreme winter weather conditions in early February that slowed some hiring.

Retail Trade had a strong 8.1 percent growth year-over-year indicating that the Magic Valley LMA still has a robust market-driven economy. *Construction* also was very strong owing to new housing starts fueled by low interest rates and a boom of business construction. It is anticipated that this trend will continue at least through the first part of 2004. All indicators show a steady market, and although it would be tough to beat 2003 economic indicators, it is expected that as the national economy progresses toward recovery, other parts of South Central Idaho will also improve.

AREA DEVELOPMENTS

Twin Falls County

- In March Dell, Inc. announced that it was restructuring its existing Consumer Technical Support Call Center that has been open since February 2002 to become a Business Relationship Call Center. Business Relations represents the largest part of Dell's market share, and the outstanding performance and technical skill of the workers in the Twin Falls call center convinced Dell executives to create the call center in Twin Falls. This is only Dell's second such call center in the nation and the move has immediate and positive consequences in the area. The existing Dell staff will receive additional training and certification in partnership with the College of Southern Idaho. Many of

Magic Valley Table 1: Labor Force & Employment
Twin Falls, Jerome, and Gooding Counties

				% Change From	
	Feb 2004*	Jan 2004	Feb 2003	Last Month	Last Year
INDIVIDUALS BY PLACE OF RESIDENCE					
<i>Seasonally Adjusted</i>					
Civilian Labor Force	58,170	57,470	54,210	1.2	7.3
Unemployment	2,300	2,210	2,110	4.1	9.0
% of Labor Force Unemployed	4.0	3.8	3.9		
Total Employment	55,870	55,260	52,100	1.1	7.2
<i>Unadjusted</i>					
Civilian Labor Force	56,920	55,900	52,890	1.8	7.6
Unemployment	2,870	2,760	2,630	4.0	9.1
% of Labor Force Unemployed	5.0	4.9	5.0		
Total Employment	54,050	53,140	50,260	1.7	7.5
JOBS BY PLACE OF WORK					
Nonfarm Payroll Jobs**	44,580	43,800	39,160	1.8	13.8
Goods-Providing Industries	7,810	7,730	6,680	1.0	16.9
Natural Resources & Mining	20	20	30	0.0	-33.3
Construction	2,520	2,410	1,730	4.6	45.7
Manufacturing	5,270	5,300	4,920	-0.6	7.1
Food Manufacturing	3,510	3,440	3,030	2.0	15.8
Other Manufacturing	1,760	1,860	1,890	-5.4	-6.9
Service-Providing Industries	36,770	36,070	32,480	1.9	13.2
Trade, Transportation & Utilities	10,130	10,100	9,710	0.3	4.3
Wholesale Trade	1,920	1,870	1,710	2.7	12.3
Retail Trade	6,130	6,240	5,670	-1.8	8.1
Utilities	270	250	180	8.0	50.0
Transportation & Warehousing	1,810	1,740	2,150	4.0	-15.8
Information	490	500	490	-2.0	0.0
Financial Activities	1,740	1,740	1,660	0.0	4.8
Professional & Business Services	6,920	6,410	4,930	8.0	40.4
Educational & Health Services	3,840	3,660	3,050	4.9	25.9
Leisure & Hospitality	3,550	3,650	3,270	-2.7	8.6
Other Services	1,500	1,520	1,480	-1.3	1.4
Government Education	4,080	3,980	3,890	2.5	4.9
Government Administration	4,520	4,510	4,000	0.2	13.0

*Preliminary Estimate

**Full- or part-time jobs of people who worked for or received wages in the pay period including the 12th of the month

these positions offer good vertical career path opportunities and the possibility of higher pay. Since the center will typically be dealing with business, the call center hours may be shortened during the week and a light crew may staff the center on weekends. This will also stabilize demand and keep most workers' hour steady throughout the year instead of fluctuating with consumer demand. This move is evidence of the area's excellent workforce aptitude for change and the strong partnership among the City of Twin Falls, College of Southern Idaho, and the Idaho Department of Labor.

- Hydro-Fittings, Inc., a Covina, California, business was scheduled to locate in Twin Falls in June or July, but has had to push back its anticipated opening date to August or September. The company is moving its entire operation to Twin Falls and experienced some delays that necessitated the changes. When open in September, Hydro-Fittings, will em-

ploy 30-35 full-time machinists, assemblers, warehouse personnel, and clerical staff.

- The new Valley Co-Op store in Buhl held its grand opening in late March with a barbeque featuring potato salad, chips, pork and beans, and pop for all. The new store, renamed Valley Country Store, is located at 708 Highway 30 East. Along with being larger, the new store offers a wider selection of goods including clothing, different boot styles, specialty feeds, animal health products, pet foods, and supplies. It also offers bird feeders and other wildlife goods, lawn and garden items, automotive, plumbing, and electrical supplies, and tools. The new store also has two fuel bays. One offers diesel only and the other accommodates a maximum of 12 vehicles with a selection of Phillips 66 mid-grade, premium, no-lead, and diesel fuel. All major credit cards are accepted and customers can apply for a local gas card through the Certified Fueling Network. Two full-time and nine part-time workers have been added to the workforce to accommodate the larger store.
- The Twin Falls School District announced proposals for major changes in its Vocational-Technical Education programs. The district proposes to expand and enhance programs so they will be more in line with the 21st century workplace. The district plans to work with the College of Southern Idaho for agricultural training. The curriculum will contain the traditional basics of farm operations such as welding, wood-working, etc., but also will offer more expanded courses in general farm management, ethics, and interpersonal skills to those students seeking farm careers. The remaining programs are to be similarly enhanced in scope and offering to encompass the broad range of skills employers are seeking.

Blaine, Camas, Gooding, Jerome, and Lincoln Counties

- A landmark agreement was reached between the state of Idaho and various water users for a mitigation plan to voluntarily curtail groundwater pumping and avoid an April 1 shutdown that would have virtually destroyed the economies of five counties on the north side of the Snake River Canyon. In 1994, Rangen, Inc. representing the aquaculture (trout and sturgeon) production won the right to issue a "call" to the Idaho Department of Water Resources if water quantity or quality should reach critical proportions regarding the health and safety of fish production. Due to years of drought, just such a call was issued affecting 750 groundwater users that irrigated more than 1.5 acres or more from groundwater and whose groundwater rights were acquired after 1962. These users, which included 25 dairies, were told to come up with a mitigation plan to curtail use of 26,500 acre-feet of water. This curtailment also included some of

the wells of local municipalities. A compromise deal was brokered through the Idaho Legislature and Governor Dirk Kempthorne in which curtailment was avoided for one year until economic impact and a viable conservation plan can be made to permanently keep the Snake River Aquifer at healthy levels.

- Wisconsin-based WOW Logistics has decided to expand its Jerome facility. The company opened the 232,000-square-foot facility in November 2002 with seven full-time employees. The company now has 21 full-time employees. WOW Logistics plans to add an additional 75,000-square feet to its existing facility to accommodate the huge boom in business the company has experienced since arriving in Idaho. The Jerome facility is WOW Logistics' first location outside of Wisconsin. The refrigeration cooler expansion is to be completed by the end of March and the building expansion should be ready for additional new inventory to add to existing stocks in August

Cassia and Minidoka Counties

- In an early March press conference at the former J.R. Simplot plant in Heyburn, the company announced it would transfer ownership of the entire 276 acres of facilities in Minidoka and Cassia Counties to the City of Burley. Mayor Jon Anderson of Burley accepted the land and, with Mayor George Anderson of Heyburn, pledged to work with the entire Mini-Cassia area to help develop the facilities into an industrial park. In his remarks at the meeting, Governor Dirk Kempthorne called the industrial park a launching pad from which the unemployed workers in the area can derive hope. It is envisioned that the industrial park will include such businesses as ice cream or cheese processors, distributors, ethanol workers, cold storage facilities, trucking operations, etc. that could employ 600-800 direct workers and eventually have a \$100 million per year economic impact on the Mini-Cassia area. Roger Madsen, Director of the Department of Labor and Interim Director of the Department of Commerce, Speaker of the House Bruce Newcomb, Representative Scott Bedke, and Representative "Bert" Stevensen, as well as mayors, county and city officials, and representatives of the Idaho Departments of Commerce and Labor, attended the event.

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SOUTHEAST IDAHO

BANNOCK, BEAR LAKE, BINGHAM, CARIBOU, FRANKLIN, ONEIDA, & POWER COUNTIES

EMPLOYMENT TRENDS

The Pocatello Metropolitan Statistical Area's (MSA) seasonally adjusted unemployment rate for February 2004 was 4.7 percent, unchanged from January 2004. The MSA's rate was eight-tenths of a percentage point below the 5.5 percent rate experienced one year ago. The area's rate was one-tenth of a percentage point below Idaho's February rate of 4.8 percent, which was up one-tenth of a percentage point from January. Cold, wintry weather continued through February and curtailed new economic activity.

The February rate was the lowest that the MSA has experienced since May 2001 when it was 3.9 percent.

The MSA experienced a gain of 720 *Nonfarm Payroll Jobs* in February 2004 (33,330) over January 2004 (32,580) as shown in Southeast Idaho Table 1. The gain occurred exclusively in the *Service-Providing Industries* in *Government Education*, which gained 490 jobs and *Professional & Business Services*, which gained 280 jobs. The increase occurred because schools returned to normal employment levels after the holiday/semester break and aggressive recruitment occurred in the *Business Support* sector. The *Goods-Producing Industries* experienced a loss of 30 jobs in February 2004 (3,850) from January 2004 (3,880). The loss of *Construction* jobs (30) was because some construction projects wrapped up and inclement weather prevented the start of new construction projects. The MSA experienced a gain of 380 *Nonfarm Payroll Jobs* in February 2004 over February 2003. As in month-over-month changes, the year-over-year increase was in the *Service-Providing Industries*. The *Goods-Producing Industries* experienced a loss of 170 jobs over the year in *Construction* (-180), because more

Southeast Idaho Table 1: Labor Force & Employment
Pocatello City MSA (Bannock County)

	Feb 2004*	Jan 2004	Feb 2003	% Change From	
				Last Month	Last Year
INDIVIDUALS BY PLACE OF RESIDENCE					
<i>Seasonally Adjusted</i>					
Civilian Labor Force	40,200	39,700	40,210	1.3	0.0
Unemployment	1,890	1,880	2,210	0.5	-14.5
% of Labor Force Unemployed	4.7	4.7	5.5		
Total Employment	38,310	37,820	38,000	1.3	0.8
<i>Unadjusted</i>					
Civilian Labor Force	41,080	40,180	41,060	2.2	0.0
Unemployment	2,280	2,230	2,600	2.2	-12.3
% of Labor Force Unemployed	5.6	5.6	6.3		
Total Employment	38,800	37,950	38,460	2.2	0.9
JOB BY PLACE OF WORK					
Nonfarm Payroll Jobs** - NAICS	33,300	32,580	32,920	2.2	1.2
<i>Goods-Producing Industries</i>	3,850	3,880	4,020	-0.8	-4.2
Natural Resources & Mining	10	10	10	0.0	0.0
Construction	1,310	1,340	1,490	-2.2	-12.1
Manufacturing	2,530	2,530	2,520	0.0	0.4
Food Manufacturing	460	450	440	2.2	4.5
Fabricated Metal Product Manufacturing	120	110	100	9.1	20.0
Machinery Manufacturing	30	30	30	0.0	0.0
Other Manufacturing	1,920	1,940	1,950	-1.0	-1.5
<i>Service-Providing Industries</i>	29,450	28,700	28,900	2.6	1.9
Trade, Transportation & Utilities	6,690	6,700	6,560	-0.1	2.0
Wholesale Trade	1,030	1,030	1,020	0.0	1.0
Retail Trade	4,370	4,390	4,290	-0.5	1.9
Utilities	40	40	40	0.0	0.0
Transportation & Warehousing	1,250	1,240	1,210	0.8	3.3
Information	660	660	600	0.0	10.0
Financial Activities	1,810	1,820	1,900	-0.5	-4.7
Professional & Business Services	3,530	3,250	3,640	8.6	-3.0
Educational & Health Services	2,660	2,610	2,790	1.9	-4.7
Leisure & Hospitality	3,210	3,160	3,210	1.6	0.0
Other Services	900	910	800	-1.1	12.5
Government Education	5,800	5,310	5,570	9.2	4.1
Government Administration	4,200	4,270	3,830	-1.6	9.7

*Preliminary Estimate

**Full- or part-time jobs of people who worked for or received wages in the pay period including the 12th of the month

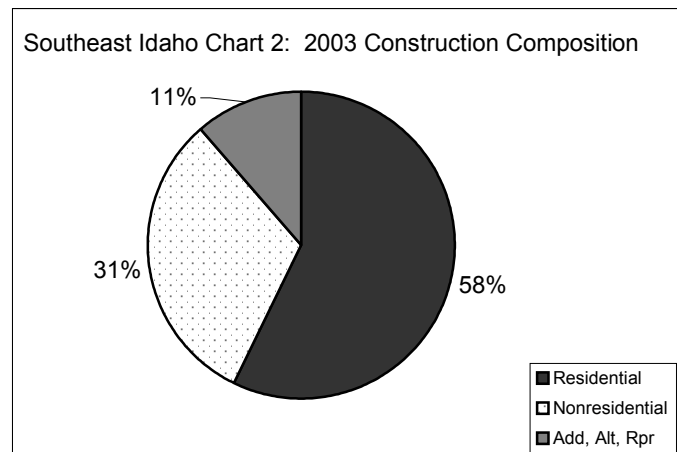
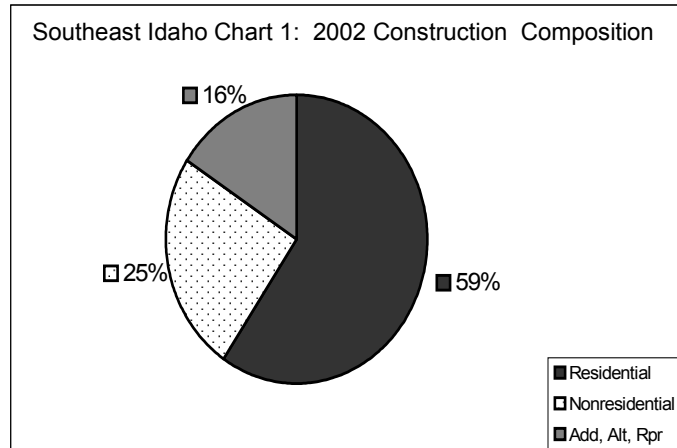
severe winter conditions in February 2004 than in February 2003 lowered construction activity.

Special Topic: 2003 Construction Activity

According to Wells Fargo's *Idaho Construction Report, December 2003*, area construction improved in 2003 over 2002. The report covers only four of the area's seven counties and includes Montpelier and Soda Springs Cities, but does not include Bear Lake or Caribou County. The report also does not include any activity in Oneida County.

Southeast Idaho construction activity in 2003 reached \$119,798,114, an increase of 19.9 percent over 2002 when it was \$99,868,894, as seen in

Southeast Idaho Table 2: Southeast Idaho Construction				
County/Area	2002	2003	\$ Change 2002-2003	% Change 2002-2003
Bannock Co.	\$55,177,820	\$68,631,816	\$13,453,996	24.4
Bingham Co.	\$28,497,642	\$34,639,647	\$6,142,005	21.6
Franklin Co.	\$10,347,381	\$10,045,099	-\$302,282	-2.9
Power Co.	\$4,424,367	\$5,167,715	\$743,348	16.8
Montpelier City	\$784,952	\$774,827	-\$10,125	-1.3
Soda Springs City	\$636,732	\$530,010	-\$106,722	-16.8
Southeast Area	\$99,868,894	\$119,789,114	\$19,920,220	19.9

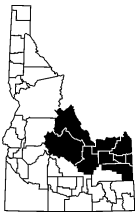


Southeast Idaho Table 2. Southeast Idaho construction activity outpaced statewide construction activity during that time. In 2003 Idaho's construction activity reached \$2,362,960,764, an increase of 13.4 percent over 2002 when it was \$2,083,156,523. Southeast Idaho Charts 1 and 2 show the composition of construction activity in 2002 and 2003. Nonresidential construction increased its share of construction activity in 2003 over 2002 by 6.0 percent. Residential construction and *Additions, Alterations & Repairs* decreased as a percent of all construction activity in 2003 from 2002 by 1.0 and 5.0 percent, respectively. Three

counties within Southeast Idaho – Bannock, Bingham, and Power - experienced increased construction activity in 2003 over 2002. The remaining areas included in the report—Franklin County, Montpelier City, and Soda Springs City—experienced decreased construction in 2003. See Southeast Idaho Chart 3 on page 22 for percent change per area from 2002 to 2003. Southeast Idaho Chart 4 (page 22), illustrates annual percentage changes from 1999 to 2003 for each area.

- In 2003 Bannock County's construction reached \$68,631,816, an increase of 24.4 percent in 2003 over 2002 when it was \$55,177,820. Residential construction led with over \$38 million in activity. Nonresidential construction had the highest rate of increase at 58.5 percent and accounted for nearly \$21 million in activity. *Additions, Alterations, & Repairs* fell nine tenths of a percentage point from 2002, but accounted for over \$9 million.
- Bingham County's 2003 construction reached \$34,639,647, an increase of 14.3 percent over 2002 when it was \$28,497,642. Residential construction experienced the highest level of activity at over \$19 million. Nonresidential construction experienced the highest rate of increase at 74.9 percent and contributed more than \$12 million in construction activity. *Additions, Alterations, & Repairs* fell 37.4 percent from 2002, but added over \$2.5 million.
- Franklin County's construction activity reached \$10,045,099 in 2003 but declined 2.9 percent from 2002 when it was \$10,347,381. Residential construction led with over \$7.5 million in activity, but fell slightly (-0.9 percent) from 2002 when it was over \$7.6 million. Nonresidential construction, at nearly \$1.3 million, increased 21.4 percent over 2002, and *Additions, Alterations, & Repairs* followed with nearly \$1.2 million down 28.4 percent from 2002 when it was over \$1.6 million.
- Power County enjoyed increased construction activity in 2003 over 2002. Construction reached \$5,167,715 in 2003, an increase of 16.8 percent over 2002 when it was \$4,424,367. Residential construction jumped 41.8 percent in 2003 to nearly \$2.5 million. Nonresidential construction fell 10.9 percent but totaled over \$2.1 million in 2003. *Additions, Alterations, & Repairs* nearly doubled in 2003 to \$483,905 from 2002 when it was \$253,078.

Continued on page 22



NORTHEAST IDAHO

BONNEVILLE, BUTTE, CLARK, CUSTER, FREMONT, JEFFERSON, LEMHI, MADISON, & TETON COUNTIES

EMPLOYMENT TRENDS

The seasonally adjusted unemployment rate for the Bonneville Labor Market Area (LMA) increased one-tenth of a percentage point over the month to 3.5 percent as seen in Northeast Table 1. Of the four counties in the LMA, Butte and Jefferson Counties both saw unemployment rate increases while Bingham and Bonneville Counties remained unchanged. Year-over-year, the LMA's rate decreased two-tenths of a percentage point with Bingham, Bonneville, and Jefferson Counties all contributing and Butte remaining unchanged. The unemployment rate for Idaho Falls, the largest city in the LMA, remained unchanged at 3.3 percent over the month, but decreased two-tenths of a percentage point over the year. The LMA's February rate was 1.3 percentage points lower than the state's rate of 4.8 percent and 2.4 percentage points lower than the national rate of 5.7 percent.

The other six counties in Northeast Idaho all experienced increases over the month with the exception of Lemhi County that decreased one-tenth of a percentage point. Clark County showed the largest percentage gain (up 1.5 percentage points to 6.2 percent). Custer County had the highest unemployment rate in Northeast Idaho at 7.6 percent. Madison County still had the lowest unemployment rate in the state at 1.8 percent. Year-over-year, all of the counties showed slight gains with the exceptions of Lemhi and Madison Counties, which both showed decreases.

Nonfarm Payroll Jobs decreased by 170 over the month to 63,650. Not surprisingly, *Construction* had the largest loss (130 jobs) due to the seasonal nature of the industry. *Retail Trade* showed a loss of 80 jobs, again due to the time of year. Gains were very minimal over the month with *Government Education* showing the greatest increase at 80 jobs. Year-over-year, *Nonfarm Payroll Jobs* increased by almost 1,100. *Construction* added 250 jobs with both commercial and residential

Northeast Idaho Table 1: Labor Force & Employment
Bonneville, Bingham, Butte, and Jefferson Counties

	Feb 2004*	Jan 2004	Feb 2003	% Change From Last Month	Last Year
INDIVIDUALS BY PLACE OF RESIDENCE					
Seasonally Adjusted					
Civilian Labor Force	85,150	85,010	83,390	0.2	2.1
Unemployment	2,980	2,920	3,090	2.1	-3.6
% of Labor Force Unemployed	3.5	3.4	3.7		
Total Employment	82,170	82,090	80,300	0.1	2.3
Unadjusted					
Civilian Labor Force	83,140	83,250	81,240	-0.1	2.3
Unemployment	3,720	3,610	3,830	3.0	-2.9
% of Labor Force Unemployed	4.5	4.3	4.7		
Total Employment	79,420	79,640	77,400	-0.3	2.6
JOBS BY PLACE OF WORK					
Nonfarm Payroll Jobs** - NAICS	63,650	63,820	62,580	-0.3	1.7
Goods-Producing Industries	9,010	9,140	9,300	-1.4	-3.1
Natural Resources & Mining	50	50	50	0.0	0.0
Construction	4,210	4,340	3,960	-3.0	6.3
Manufacturing	4,750	4,750	5,290	0.0	-10.2
Food Manufacturing	2,760	2,760	3,020	0.0	-8.6
Fabricated Metal Product Manufacturing	250	260	240	-3.8	4.2
Machinery Manufacturing	400	400	430	0.0	-7.0
Other Manufacturing	1,340	1,330	1,600	0.8	-16.3
Service-Providing Industries	54,640	54,680	53,280	-0.1	2.6
Trade, Transportation & Utilities	14,990	15,060	14,550	-0.5	3.0
Wholesale Trade	5,170	5,180	4,990	-0.2	3.6
Retail Trade	7,990	8,070	7,810	-1.0	2.3
Utilities	120	110	110	9.1	9.1
Transportation	1,710	1,700	1,640	0.6	4.3
Information	910	910	940	0.0	-3.2
Financial Activities	2,170	2,170	2,110	0.0	2.8
Professional & Business Services	11,700	11,750	11,320	-0.4	3.4
Educational & Health Services	6,680	6,650	6,220	0.5	7.4
Leisure & Hospitality	4,990	5,000	4,860	-0.2	2.7
Other Services	2,010	2,030	2,290	-1.0	-12.2
Government Education	5,130	5,050	5,200	1.6	-1.3
Government Administration	6,060	6,060	5,790	0.0	4.7

*Preliminary Estimate

**Full- or part-time jobs of people who worked for or received wages in the pay period including the 12th of the month

construction holding strong in all counties. *Professional & Business Services* added almost 400 jobs and *Educational & Health Services* added 460 jobs. *Government Administration* also added almost 300 jobs. *Trade, Transportation & Utilities* added 440 jobs with *Retail Trade* and *Wholesale Trade* adding almost 200 jobs each. *Manufacturing* showed the greatest loss (540 jobs) with both the *Food Manufacturing* and *Other Manufacturing* sectors contributing equally.

AREA DEVELOPMENTS

Bonneville County

- Idaho Falls was named as one of the top 10 emerging cities in a recent book, *Cities Ranked and Rated* by Bert Sperling and Peter Sander, which examined the newly designated Metropolitan Statistical Areas

(MSA's) throughout the nation. The book describes Idaho Falls as "Gateway to Yellowstone Park and the Tetons, but the town is 'nondescript' without 'much to do.'" The city plans to prove the last part of the description wrong. Idaho Falls has focused on cultural diversity for some time and is proud of what the city offers for its size (approximately 51,000). Area cities also cited as emerging include: Coeur d'Alene; Logan, Utah; Bend, Oregon; and Mount Vernon-Anacortes, Washington. The list was also published in **USA Today** in late March.

- Sam's Club in Idaho Falls is planning an expansion to add a one-hour photo department and vision center to bring it in line with the company's newer stores. Plans filed at the Idaho Falls Building Department call for an additional 25,000-square feet along with a gas station in the parking lot. Expansion should start in May and wrap up before the end of the year. The store will remain open to customers during construction.
- Idaho Falls School Board members voted to move classes from Westview Alternative High School to Emerson Elementary. Earlier this year, the board voted to close Emerson after the current school year because of budget limitations. Nearly 70 students attend Westview during the day and approximately 90 students take night classes at Skyline High School. Skyline has been accommodating some of Westview's students for night classes. Westview's current location south of town has been operating without a cafeteria, a library, or warm rooms in the winter. Soon it will have all three.
- Johnson Brothers Inc., a custom cabinet-making shop and specialty hardware store in Idaho Falls, experienced a loss the end of March when one of its five buildings caught fire. Fire officials were able to contain the fire and not much damage was done to other buildings. Although some new equipment had to be ordered, the company is still able to operate.
- Idaho Falls has a new eatery, Aussie Eats, located at 552 North Capital Avenue. The restaurant offers Australian food at very affordable prices (nothing on the menu is over \$3.00). Owner Brian Hall is from Queensland, Australia, and has been in the states since 1999. Aussie Eats is open Monday through Friday for breakfast and lunch.
- Ron Folsom, an Ammon resident since 1973 and a member of the city planning and zoning commission since 1988, was recently named to the new position of city planner. Ammon's projected growth prompted city officials to add the part-time position. Commercial development in Ammon has increased dramatically over the past several years, along with residential growth, adding to the need for a dedicated planner for the city.

Fremont County

- The old St. Anthony City Hall recently was sold to Ohs Incorporated at auction for \$75,000. The hall has been used as a high school gym, a cafeteria, a scout meeting place, a senior's citizen center, a kindergarten, and is currently the town's public library. The new owner, Charles Ohs, will use it to expand his social services agency that is currently overflowing. The building is located at 110 West Main Street in St. Anthony. The change should take place in a few months when the public library moves out of the old city hall to the new city building at 420 North Bridge Street.

Jefferson County

- Roberts held its groundbreaking ceremony for a new water system. Construction has already begun with completion planned for the end of July. The new \$1.7 million system is being funded by residents along with grants from the U.S. Department of Agriculture and the Idaho Department of Commerce. The new system will replace antiquated lines and includes an additional 300,000-gallon steel reservoir to supplement the current 30,000-gallon reservoir. The new system should relieve such common problems as sand in the water, low water pressure, and boil orders.

Lemhi County

- Salmon's downtown Rexall closed its doors in March after many decades in business. "You can only make it work if you have a lot of cash," said owner/manager Wayne McAtee regarding the closure. Salmon has had several blows throughout its history such as mining and lumber industry declines. But the most recent blows have been the fires in 2000; tourism slowdowns since September 2001; the stock market slump; the rise of Internet sales; and most recently, Idaho's sales tax hike to 6.0 percent when neighboring Montana has no sales tax. Montana also has a wealth of discount stores. Although many residents are worried about the affect these condition are having on retail as a whole, some employers continue to seek ways to compete. Questionnaires have been circulated around town to find out what merchants need and want. Other employers are offering 6.0 percent discounts at consistent times of the month to combat the absence of sales tax in Montana. Economic development that focuses on unique features of the town is still a priority. For example, the Lewis & Clark Celebration is still around the corner and hopes are high that the events will spur more opportunities.

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Recession

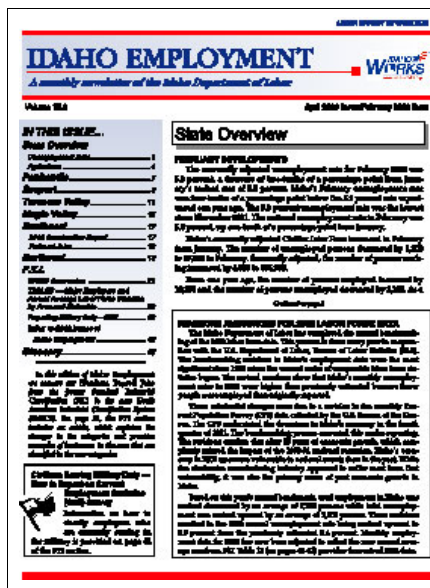
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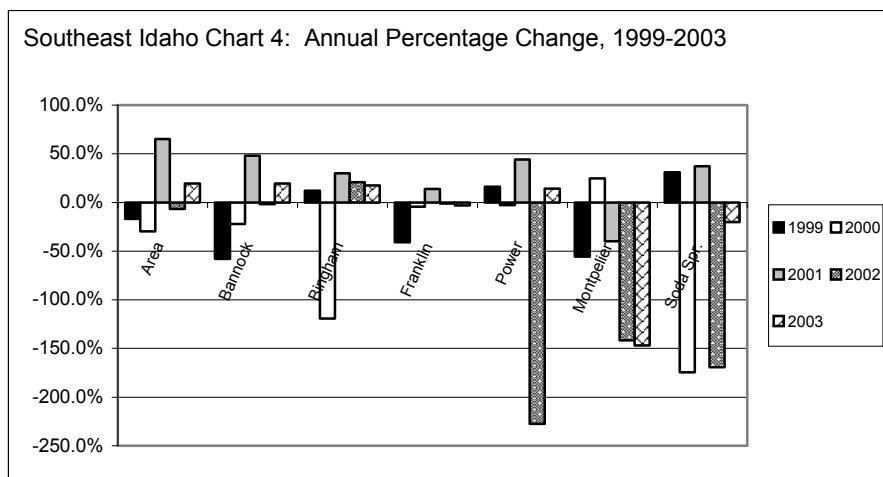
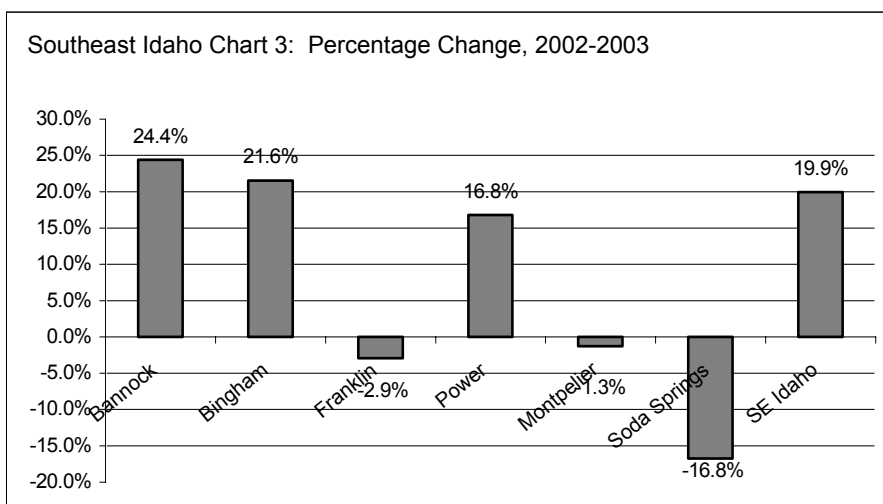


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- Montpelier's construction fell slightly (-1.3 percent) in 2003 to under \$775,000 from 2002 when it was over \$780,000. Residential construction increased 6.0 percent to \$318,000 while nonresidential construction fell 76.2 percent to 62,900. *Additions, Alterations, & Repairs* more than doubled in 2003 to \$393,927 from 2002 when it was \$181,952.
- In 2003, Soda Springs' construction fell 16.8 percent to \$530,010 from \$636,732 in 2002. Residential construction led with over \$437,000 in activity, but fell

9.7 percent from 2002 when it was \$484,000. Non-residential construction increased 29.1 percent to \$71,080 from 55,052 in 2002. *Additions, Alterations, & Repairs* fell more than 77 percent in 2003 to \$21,900 from 2002 when it was nearly \$98,000.

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Glossary of Labor Market Terms

Agriculture Employment: Persons on agriculture payrolls who work or receive pay for any period during the survey week. This includes owners, operators, unpaid family members who work at least 15 hours a week, and hired laborers.

Average Hourly Earnings/Average Weekly Hours: The average total money earnings earned by production or non-supervisory workers for selected industries. The average number of hours worked by production or non-supervisory workers including overtime, paid vacation, and sick leave. The data is collected for the week including the 12th of the month.

Average Weekly Earnings: Average Hourly Earnings multiplied by Average Weekly Hours.

Civilian Labor Force: A count of non-institutional persons 16 years of age and over residing within a specific geographic area, excluding members of armed forces, who are classified as employed, unemployed and seeking employment, or involved in a labor dispute.

Consumer Price Index (CPI): A national index measuring changes over time in the price of a fixed market basket of goods and services. There are two indexes—the All Urban Consumers (CPI-U) represents the buying habits of about 80 percent of the non-institutional population of the United States, and the Urban Wage & Clerical Workers (CPI-W) represents 40 percent of the population.

Covered Employers: Employers who are subject to state and federal Unemployment Insurance laws.

Durable Goods: Also known as “hard goods” because they include items manufactured or provided by wholesalers with a normal life expectancy of three years or more.

Employed: Individuals, 16 years of age or older, who worked at least 1 hour for pay or profit or worked at least 15 unpaid hours in a family business during the week including the 12th day of the month. Individuals are also counted as employed if they had a job but did not work because they were: ill, on vacation, in a labor dispute, prevented from working because of bad weather, or temporarily absent for similar reasons.

Initial Claim: Any notice of unemployment filed to request (1) a determination of entitlement to and eligibility for compensation or (2) a second or subsequent period of unemployment within a benefit year or period of eligibility.

Labor Market Area (LMA): An area that consists of a central city or cities and the surrounding territory within commuting distance. It is an economically integrated geographic area within which individuals can reside and find employment without changing place of residence. Idaho has nine LMAs.

Metropolitan Statistical Area (MSA): An area that has either a city with a population of at least 50,000 or a Bureau of Census urbanized area of at least 50,000 and a

total metropolitan area of at least 100,000. The Office of Management and Budget designates the MSAs. There are five MSAs in Idaho—Boise City-Nampa MSA (including Ada and Canyon Counties), Coeur d’Alene MSA (Kootenai County), Idaho Falls MSA (Jefferson and Bonneville Counties), Lewiston MSA (Nez Perce County in Idaho and Asotin County in Washington), Logan MSA (Franklin County and the Logan, Utah, Metro Area), and Pocatello City (Bannock County).

Nonfarm Wage & Salary Employment: Persons on nonfarm establishment payrolls (including employees on paid sick leave, paid holiday, or paid vacation) who work or receive pay for any part of the week including the 12th of the month. It is a count of jobs by place of work. It does not include self-employed, unpaid volunteer or family workers, domestic workers in households, military personnel and persons who are laid off, on leave without pay, or on strike for the entire reference period.

Nondurable Goods: Also known as “soft goods” because they include items manufactured or provided by wholesalers that generally last for only a short period of time (three years or less).

Seasonally Adjusted: Data is seasonally adjusted to remove the impact of regular events that occur at the same time every year such as the effect of cold weather on outdoor activities, the Christmas holiday, or the summer influx of youth into the labor market.

Unemployed: Those individuals, 16 years of age or older, who do not have a job but are available for work and actively seeking work during the week including the 12th of the month. The only exceptions to these criteria are individuals who are waiting to be recalled from a layoff and individuals waiting to report to a new job within 30 days—these, too, are considered unemployed.

Unemployment Insurance: Unemployment Insurance is a program for the accumulation of funds paid by employers, to be used for the payment of Unemployment Insurance to workers during periods of unemployment which are beyond their control.

Unemployment Rate: The number of persons unemployed expressed as a percentage of the labor force.

Weekly Benefit Amount: The amount payable to a claimant for a compensable week of total unemployment.

Weeks Claimed: The number of weeks that unemployed workers claimed Unemployment Insurance benefits.

Weeks Compensated: The number of weeks for which compensation was actually paid.